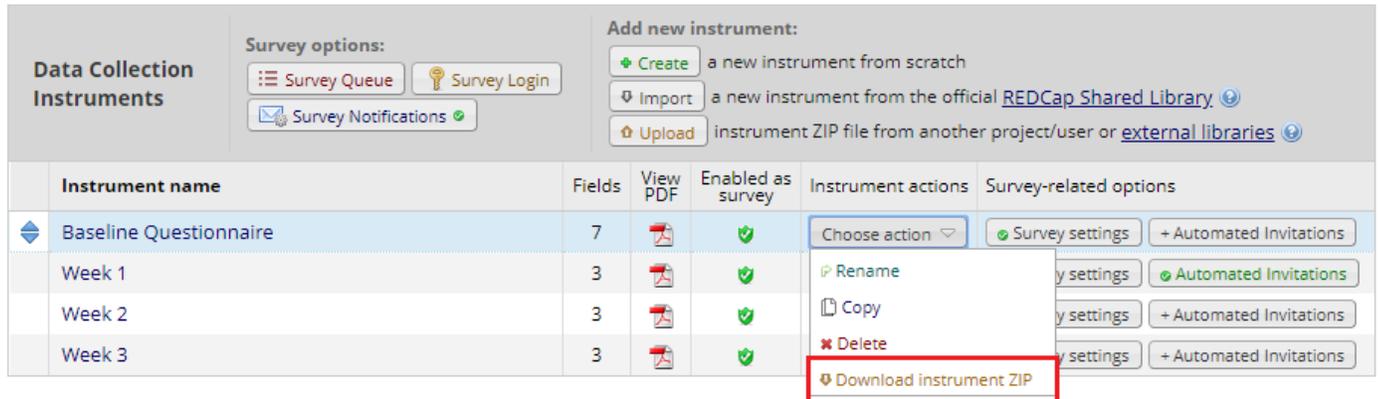


REDCap – How to Copy Instruments from One Project to Another

If you have an instrument in Project #1 that you have created and would like to use in Project #2, you can copy the instrument from your original project via downloading the instrument ZIP file and then uploading that file into your new project.

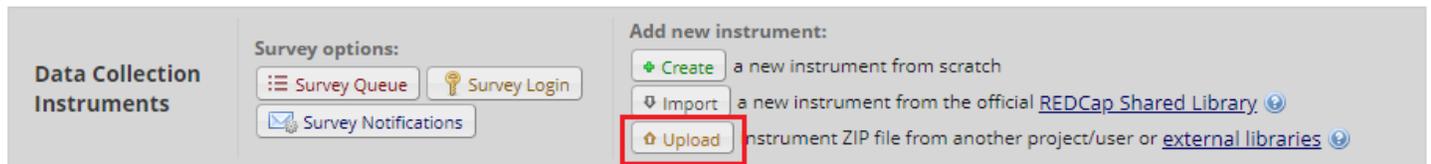
- Navigate to the Online Designer in Project #1, and click on the “Choose action” dropdown button next to the instrument you would like to copy. In the example below, we are copying in the instrument, “Baseline Questionnaire.” Select “Download Instrument ZIP.”



The screenshot shows the REDCap Online Designer interface. On the left, there's a 'Data Collection Instruments' section. In the center, there's a table of instruments. The first instrument is 'Baseline Questionnaire', which has 7 fields and is enabled as a survey. A dropdown menu is open next to it, showing options: 'Rename', 'Copy', 'Delete', and 'Download instrument ZIP'. The 'Download instrument ZIP' option is highlighted with a red box. To the right of the table, there are 'Survey-related options' like 'Survey settings' and '+ Automated Invitations'.

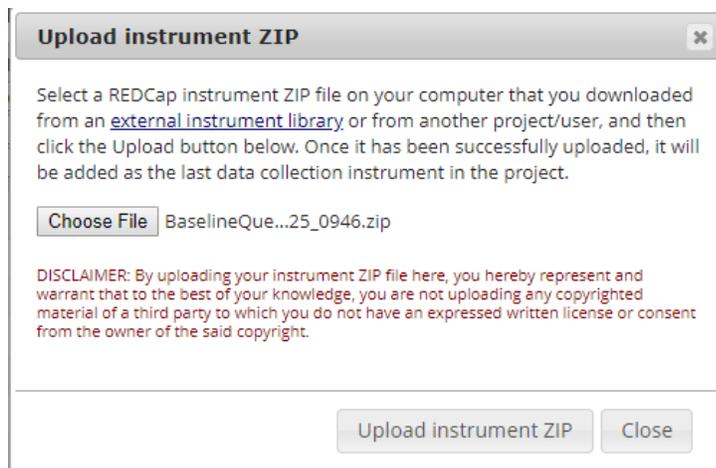
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Baseline Questionnaire	7			Choose action	Survey settings + Automated Invitations
Week 1	3			Rename	Survey settings + Automated Invitations
Week 2	3			Copy	Survey settings + Automated Invitations
Week 3	3			Delete	Survey settings + Automated Invitations
				Download instrument ZIP	

- Save the ZIP file to your computer and note the folder that you saved it in.
- Open Project #2, and navigate to the Online Designer. Click on the “Upload” button under the “Add new Instrument” header.



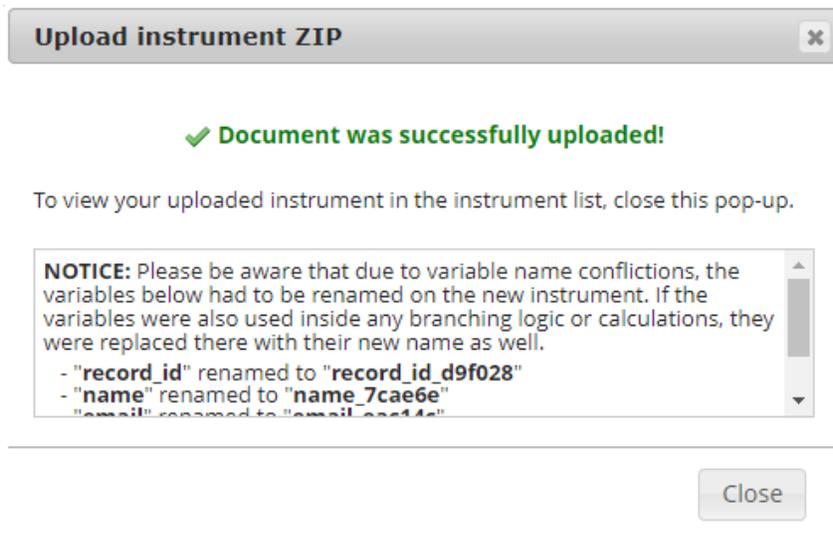
The screenshot shows the REDCap Online Designer interface. In the 'Add new instrument:' section, the 'Upload' button is highlighted with a red box. The other buttons are 'Create' and 'Import'.

- A popup window will appear. Select the “Choose File” button, and locate the ZIP file that you previously saved to your computer.



The screenshot shows a popup window titled 'Upload instrument ZIP'. It contains the following text: 'Select a REDCap instrument ZIP file on your computer that you downloaded from an external instrument library or from another project/user, and then click the Upload button below. Once it has been successfully uploaded, it will be added as the last data collection instrument in the project.' Below this text is a 'Choose File' button with the filename 'BaselineQue...25_0946.zip'. At the bottom, there are two buttons: 'Upload instrument ZIP' and 'Close'. A disclaimer is also present: 'DISCLAIMER: By uploading your instrument ZIP file here, you hereby represent and warrant that to the best of your knowledge, you are not uploading any copyrighted material of a third party to which you do not have an expressed written license or consent from the owner of the said copyright.'

- After selecting your ZIP file, click “Upload instrument ZIP.” You should then see a popup window that says the document was successfully uploaded. If there were any variables name in your uploaded instrument that already existed in Project #2, REDCap will automatically rename those variables and will notify you here.



- The instrument will appear at the bottom of your list of instruments, but you can drag it to appear anywhere in the list.
- Note: If the copied instrument was a survey, the survey settings will not copy over to the new project. You will need to re-enable the survey functionality and set the appropriate survey settings in the new project.